

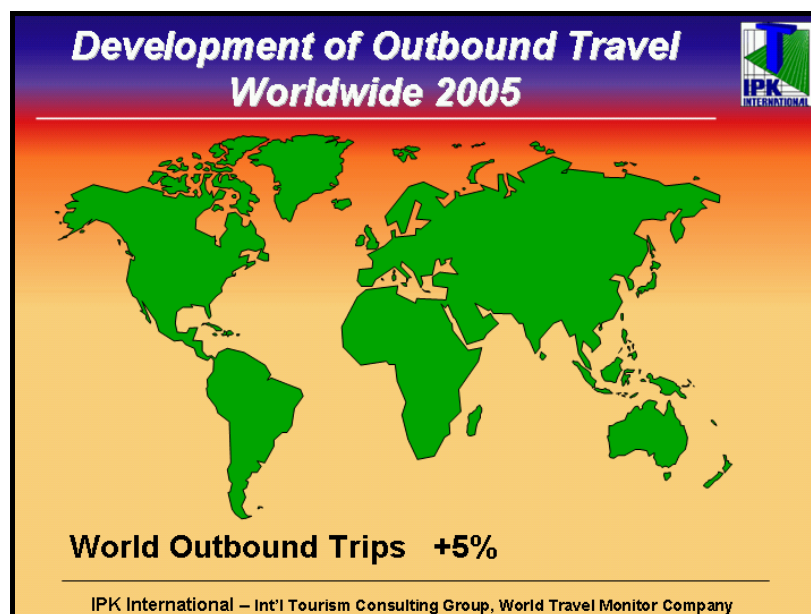
Global Travel Trends 2005

Based on the new data from the 2005 "World Travel Monitor,"
and as it does every year at this time, IPK International reveals:

- ➔ ***Latest World Travel Trends***
- ➔ ***European Travel Trends***
- ➔ ***German Travel Trends***

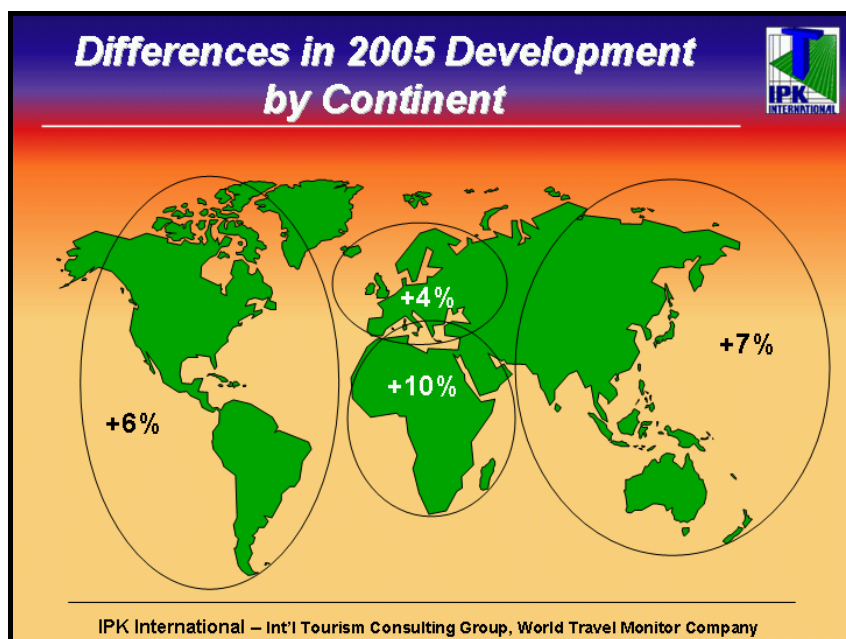
IPK International's "World Travel Monitor" is the largest and in fact sole tourism study in the world to monitor the pulse of international tourism. The "World Travel Monitor" data derives from population-representative surveys taken in the individual source markets.

Latest World Travel Trends



On the global level, outbound trips rose by +5% in 2005.

This growth was caused by increasing affluence, rapidly spreading low cost offers around the globe as well as by the Asian newcomers, still wanting to discover the world and having a large backlog demand for international travel.



All continents contributed to the worldwide increase in outbound trips in 2005.

African destinations were thereby at the leading edge registering a growth of +10%, followed by Asia with +7% growth.

America (+6%) and Europe (+4%) also attained good growth in 2005.

European Travel Trends

Development of European Outbound Trips in 2005

Outbound Trips From*	
Spain	+15%
Russia	+14%
Poland	+14%
Ireland	+ 8%
Norway	+ 8%
Denmark	+ 8%
France	+ 7%

*European outbound travel markets with more than 5 million outbound trips

IPK International – Int'l Tourism Consulting Group, World Travel Monitor Company

The most dynamic European source markets in 2005 were above all Spain (with 15% more outbound trips) as well as Russia and Poland (with 14% more outbound trips each).

Solid figures are also noted for the source markets Ireland, Norway and Denmark (with 8% more trips each) as well as France with +7%.

Key Data on the 2005 European Outbound Travel Market



Number of Trips	370 million	+ 4%
Number of Nights	3.5 billion	+ 2%
Travel Spending	330 billion euros	+ 5%

Basis: All Trips 1N+ (Holiday, Business, VFR)

IPK International – Int'l Tourism Consulting Group, World Travel Monitor Company

In 2005, the Europeans took a total of 370 million outbound trips (+4% over the previous year), thereby spending 3.5 billion nights abroad (+2%).

These outbound trips generated a volume of spending totaling 330 billion euros (+5% increase over the previous year).

European Holiday Types Important Segments of Growth in 2005



Winners 2005



City + 20%



Winter + 12%



Mountains + 8%



Sun&Beach + 3%

IPK International – Int'l Tourism Consulting Group, World Travel Monitor Company

Leaping +20%, the "city trip" segment achieved the greatest growth in 2005.

Also the "winter (snow) holiday" registered an exuberant +12% growth.

The segment "holiday in the mountains" exhibited a plus of 8%.

The leading type of holiday for the Europeans – the "Sun&Beach" – gained +3%.

Main Destinations for Europeans in 2005



Rank	Destination	Share in %
1	Spain	13%
2	France	11%
3	Germany	8%
4	Italy	8%
5	Austria	5%
6	Great Britain	5%
7	Turkey	4%

Basis: All Trips 1N+ (Holiday, Business, VFR)

IPK International – Int'l Tourism Consulting Group, World Travel Monitor Company

Spain and France were again the most popular outbound destinations for the Europeans in 2005, market shares here were 13% respectively 11%.

Altogether more than half of all European trips were made to the destinations Spain, France, Germany, Italy, Austria, Great Britain and Turkey.

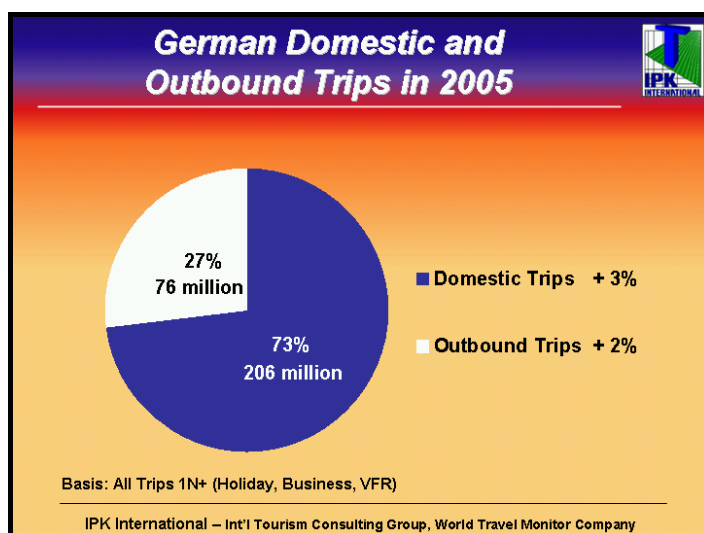
German Travel Trends



In 2005, the Germans took a total of 282 million domestic/outbound trips, thereby spending 1.4 billion nights away from home.

In comparison to the previous year, travel volume thus rose by +3%, overnight accommodation volume by +1%.

The domestic/outbound trips taken by the Germans in 2005 led to a total spending volume of 120 billion euros (+2% increase).



In greater detail, the Germans took 206 million domestic trips and 76 million outbound trips during 2005.

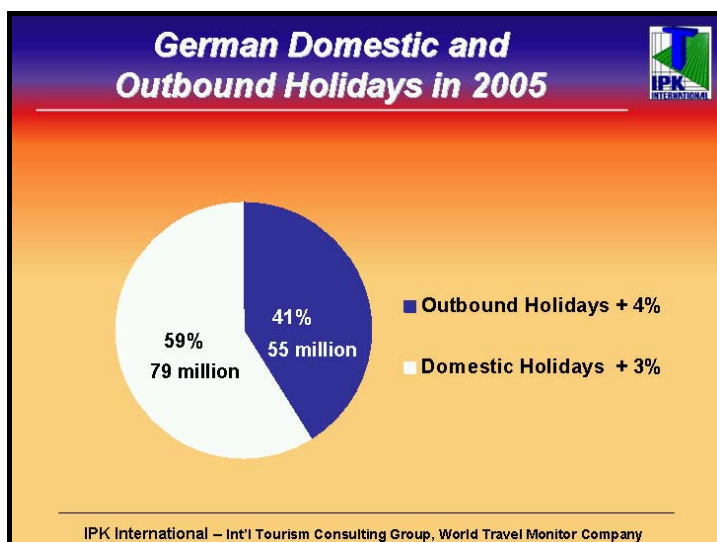
Compared to the year before, growth was +3% in domestic trips and +2% in outbound trips.



Holidays accounted for 47% of the domestic/outbound trips taken by the Germans, and reflect a +3% volume increase over the past year.

The other private trips (at a 40% market share) recorded a +1% gain.

German business trips also increased again in 2005 (+6%).



In 2005, the Germans took a total of 79 million domestic holidays, a +3% increase over the previous year.

There was a somewhat higher rise (+4%) in volume for the German outbound holidays (55 million in total).

Taken as a whole, aggregate growth in German holiday travel

Main Outbound Holiday Destinations for Germans in 2005

Rank	Destination	Share in %
1	Spain	16%
2	Austria	14%
3	Italy	13%
4	France	7%
5	Turkey	7%
6	Netherlands	4%
7	Greece	3%
...	America	4%
	Asia-Pacific	3%

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With a market share at 16%, Spain was the leading outbound holiday destination for the Germans in 2005.

Followed by Austria at 14% and Italy at 13%.

France and Turkey also ranked among the "Top 5" outbound holiday destinations of the Germans in 2005.

Main Domestic Holiday Destinations for Germans in 2004

Rank	Destination	Share in %
1	Bavaria	21%
2	Lower Saxony	11%
3	Baden-Wuerttemberg	10%
4	North Rhine-Westphalia	9%
5	Mecklenburg-West. Pom.	8%
6	Schleswig-Holstein	7%
7	Saxony	7%
8	Berlin	6%

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Among domestic destinations, Bavaria was again the undisputed market leader in 2005 (commanding a 21% market share of all the German domestic trips).

Lower Saxony ranks as the second most popular holiday destination while Baden-Württemberg comes in third.



IPK International is a leading, internationally-active consulting firm for the tourism industry comprising the company divisions:

- **Tourism Research**
Quantitative and qualitative tourism research - worldwide
- **Tourism Marketing**
Development of marketing strategies, programs and business development concepts at the regional/national/international level
- **World Travel Monitor® / European Travel Monitor®**
The largest continuous tourism study worldwide on the outbound travel behavior of more than 50 European/international markets

What exactly does the World Travel Monitor divulge?

IPK has been surveying all European outbound overnight travel patterns since 1988 with its European Travel Monitor. Additional international outbound travel markets were incorporated into the survey on a regular basis from the year 2000 (e.g. the U.S., Brazil, China, Japan, India, etc.) in what is now known as the World Travel Monitor.

Since the study's inception, over five million people in more than 50 countries have been surveyed on a representative basis as to their outbound travel behavior. Apart from short and longer holiday trips, business trips and other private trips of at least one overnight stay are also included.

The survey is conducted as a multi-client study. Principal clients include national ministries and tourist boards, tour organizers, international hotel concerns and other parties to the travel industry.

Outbound Travel Data from more than 50 Countries

European outbound travel markets

- | | | | |
|------------------|-----------------|---------------|---------------|
| - Austria | - Finland | - Latvia | - Russia |
| - Belarus | - France | - Lithuania | - Serbia |
| - Belgium | - Germany | - Luxembourg | - Slovakia |
| - Bosnia | - Great Britain | - Montenegro | - Slovenia |
| - Bulgaria | - Greece | - Netherlands | - Spain |
| - Croatia | - Hungary | - Norway | - Sweden |
| - Czech Republic | - Iceland | - Poland | - Switzerland |
| - Denmark | - Ireland | - Portugal | - Turkey |
| - Estonia | - Italy | - Romania | - Ukraine |

Other international outbound travel markets

- | | | | |
|-------------|------------|----------------|------------------------|
| - Bahrain | - India | - Morocco | - Thailand |
| - Brazil | - Israel | - Saudi Arabia | - United Arab Emirates |
| - Canada | - Japan | - Singapore | - USA |
| - China | - Kuwait | - South Korea | |
| - Hong Kong | - Malaysia | - Taiwan | |

World Travel Monitor Catalogue of Questions

- | | | |
|-------------------------------|--|------------------------|
| - Number of outbound trips | - Means of transportation (incl. low fare) | - Travel expenditures |
| - Number of overnight stays | - Accommodation | - Gender and age |
| - Sales volumes | - Travel season | - Child accompaniment |
| - 100+ destinations worldwide | - Trip organization | - Household's children |
| - Purpose of trip | -- Booking channels | - Household's size |
| - Type of holiday | -- Booking products | - Social status |
| - Content of holiday | - Internet usage | - Region of origin |
| - Type of business trip | - Other sources of information | - Travel frequency |
| - Length of trip | - Time frame for pre-booking | - Travel intensity |

Findings extracted from the World Travel Monitor can be purchased on a per-market basis in the form of standard tables, customized data packages, or together with detailed analyses (Travel Monitor Reports – also see below).

2005 Special Publications

- ***Special Outbound Travel Monitor Reports 2005***

Based on European / World Travel Monitor data IPK International compiles special reports for each of the below listed markets.

All Western and Eastern European markets

Arabia (Bahrain, Kuwait, Saudi Arabia, United Emirates)

Asia (e.g. Japan, India, China, Hong Kong, Malaysia, etc.)

the **Americas** (USA, Canada, Brazil)

These special Outbound Travel Monitor Reports covering the outbound travel behavior of the respective population, give a complete overview of the total volume and travel structure of the outbound trips.

- ***Generation Project: Forecast Study on Travel Behavior in 2010/20***

What impact do the demographic changes in diverse source markets have in store for outbound travel behavior? The 'Generation Forecast Study 2010/20' by IPK International offers prognoses on the future outbound travel behavior of the British, Belgians, Germans, French, Italians, Dutch, Swedes, Spaniards, Canadians, US-Americans and also Russia based on the comprehensive data contained within the World Travel Monitor database.

***For further information please contact us,
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